Guide to Making Stock Gifts to
The Packer Collegiate Institute

If you would like to make a gift of stock to The Packer Collegiate Institute, this is the information you will need:

If your stock is in a brokerage account, your broker may transfer your stock to Packer’s account at Merrill Lynch.

Account Number  833-04020  
DTC number  5198  
Broker  Nancy Grodin  
Merrill Lynch  
112-05 Queens Boulevard  
Forest Hills, NY 11375  
(516) 498-3379, nancy_grodin@ml.com

We recommend that you also notify Packer’s Development Office of your intention to transfer stock. You may do this at (718) 250-0228 or sbhargavasears@packer.edu.

If you have the shares in your possession, you may send the unendorsed certificate to Packer. In a separate envelope, send a stock power and a stock release signed in the same name as the certificate is registered, with nothing else filled in. Please do not have the name on the certificate changed to Packer by the issuing company.

For your tax return purposes, Packer values the stock at the mean of the high and low prices on the date of transfer.

If you have any additional questions, please contact Shriya Bhargava-Sears in the Packer Development Office at (718) 250-0228 or sbhargavasears@packer.edu.

Thank you very much for your gift.